

WORKSHEET 1.1. Proposal Idea Questionnaire.

1. What new projects is your organization planning for the next two to three years?

Project A:

Project B:

Project C:

Project D:

2. Which of these projects are compatible with your organization's current mission and purpose? (When a project falls outside your mission, considerable justification will be necessary to convince a funder to support it.) (Check the category that applies to each project.)

Project	Compatible with Mission	Not Compatible
A		
B		
C		
D		

3. What is unique about your organization's project?

Project	Uniqueness
A	
B	
C	
D	

4. Who else is doing this project? Is there duplication of effort? Can a partnership be formed that will benefit all organizations concerned with this project?

Project	Duplicate Project (with whom)	Possible Collaboration (with whom)
A		
B		
C		
D		

(Continued)

WORKSHEET 1.1. Proposal Idea Questionnaire. (Continued)

5. What community need does each of your organization's projects address?

Project	Need Addressed
A	
B	
C	
D	

6. What members of your community—including civic leaders, political figures, the media, and your organization's clients—support each project?

Project	Supporters
A	
B	
C	
D	

7. Does your organization currently have the expertise to undertake each project? If new staff are necessary, can the organization manage growth in personnel effectively? (Check the category that applies to each project.)

Project	Expertise	Effective Growth Management
A		
B		
C		
D		

8. Is there internal support for the project? External support? (Check the category that applies to each project.)

Project	Internal Support	External Support
A		
B		
C		
D		

WORKSHEET 2.1. Letter of Intent Questionnaire.

- 1. What is the purpose of this letter of intent? Whom is it being sent to, and what is the fit?**
- 2. What year was our organization founded? What year was it incorporated?**
- 3. What is the mission of our organization?**
- 4. What are our long-term goals for our organization?**
- 5. What programs do we provide that support these goals?**
- 6. What is the need in our community that we seek funding to address?**
- 7. How in our view is the need related to our programs, long-term goals, and mission?**
- 8. What do we propose to do about this need?**
- 9. What outcome do we anticipate after the first year of funding?**
- 10. What is the total cost of our proposed idea for the first year (or multiple years if we plan to request multiple-year funding)? How much do we want from this funder?**
- 11. Who will be contacting the funder to determine its interest and when? Whom should the funder contact for more information?**

Now that you have finished answering the questions, you can take the information and build a letter of intent. The ideal way to write the letter is to follow this format: opening, background, problem statement, proposed solution, closing. Note that the questions you answered followed this format.

WORKSHEET 3.1A. Statement of Need Questionnaire.

Use the filled-out Worksheet 3.1B in the book as an example to follow as you complete this questionnaire.

Who? Where? When?	What? Why?	Evidence of Problem	Impact If Problem Is Resolved?
Who is in need (Maybe people, animals, plants, and so on.)	What is the need?	What evidence do you have to support your claim?	What are the consequences of meeting the need?
Where are they?	Why does this need occur?		How is the need linked to your organization?
When is the need evident?			

WORKSHEET 4.1A. Goals and Objectives Exercise.

Use the filled-out Worksheet 4.1B in the book as an example to follow as you complete this exercise.

GOAL:

	Objective 1	Objective 2	Objective 3	Objective 4
Direction of change				
Area of change				
Target population				
Degree of change				
Time frame				

Follow this standard form as you write out your objective statements:

To (direction of change) + (area of change) + (target population) + (degree of change) + (time frame).

WORKSHEET 5.1A. Methods Exercise.

Use the filled-out Worksheet 5.1B in the book as an example to follow as you complete this exercise.

Tasks and Subtasks	Person(s) Responsible	Resources Needed	Start and Finish Dates

WORKSHEET 6.1A. Evaluation Planning Questionnaire.

Use the filled-out Worksheet 6.1B in the book as an example to follow as you complete this questionnaire.

1. What questions will your organization's evaluation activities seek to answer?

2. What are the specific evaluation plans and time frames?

a. What kinds of data will be collected?

b. At what points?

c. Using what strategies or instruments?

d. Using what comparison group or baseline, if any?

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WORKSHEET 7.1A. Future Funding Questionnaire.

Use the filled-out Worksheet 7.1B in the book as an example to follow as you complete this outline.

Risks and Opportunities	Sources of Future Financial Resources	Internal Requirements
<p>Do we intend to continue this project?</p> <p>For how long?</p> <p>What resources (direct and indirect) are needed?</p>	<p>What sources can we use?</p>	<p>What internal plans relate to future funding?</p>

WORKSHEET 8.1A. Revenue and Expense Budget.

Use the filled-out Worksheet 8.1B in the book as an example to follow as you complete this budget.

	CASH REQUIRED	IN-KIND CONTRIBUTIONS	TOTAL BUDGET
REVENUE			
Foundations			
Government			
Corporations			
Individual contributions			
Donated printing and supplies			
Volunteer services			
Other (specify):			
Total revenue			
EXPENSES			
Salaries (prorated if less than full time)			

Payroll taxes and benefits (percentage of salaries)			
Bookkeeping contractor			
Other (specify):			
Total personnel			
Office rent			
Supplies			
Printing			
Utilities			
Telephone			
Copy services			
Postage			
Travel			
Membership dues			
Other (specify):			
Total nonpersonnel			
Total expenses			

WORKSHEET 9.1A. Organization Background Exercise.

Use the filled-out Worksheet 9.1B in the book as an example to follow as you complete this exercise.

Name	Accomplishments	Personnel
Location		
Legal status		
Date of founding		
Mission		
Target population		
Programs		
Summary of need statement		

WORKSHEET 10.1A. Summary Questionnaire.

Use the filled-out Worksheet 10.1B in the book as an example to follow as you complete this questionnaire.

- 1. Who is your organization, and what is its mission?**
- 2. What is the proposed project (title, purpose, target population)?**
- 3. Why is the proposed project important?**
- 4. What will be accomplished by this project during the time period of the grant?**
- 5. Why should your organization do the project (credibility statement)?**
- 6. How much will the project cost during the grant time period? How much is being requested from this funder?**

WORKSHEET 11.1. Final Proposal Checklist.

Place a check mark next to each step after it is completed.

- _____ Determine which project ideas have the best chance of being funded.
- _____ Form a planning team that includes clients affected by the project, community leaders, key staff and volunteers, and other organizations with similar or complementary projects.
- _____ Design a program or project plan.
- _____ Conduct thorough research to determine funding sources interested in the project.
- _____ Telephone the targeted funding source to request information helpful in preparing the proposal (annual report, grant guidelines, and so on).
- _____ Read all funding source materials to ensure the proposal follows their directions.
- _____ Prepare the proposal core components by stating the need or problem to be addressed, the objectives and methods for meeting the need, the ways the project will be evaluated and funded in the future, and the budget.
- _____ Prepare the final proposal components: the introduction, summary, and cover letter.
- _____ Determine those features in the project that may set it apart from other projects and will appeal to the funder.
- _____ Make sure those features are highlighted for the funder.
- _____ Ensure the proposal is clear and well written by having at least one person review it and provide feedback.
- _____ Include the appendixes requested by the funder.
- _____ Check funder deadlines and the number of proposal copies to be submitted in order to meet the requirements.
- _____ Give copies of the proposal to the planning team and other individuals or groups who should be aware of the project.
- _____ Telephone the funder within two weeks after mailing the proposal.